

FIGURE 1

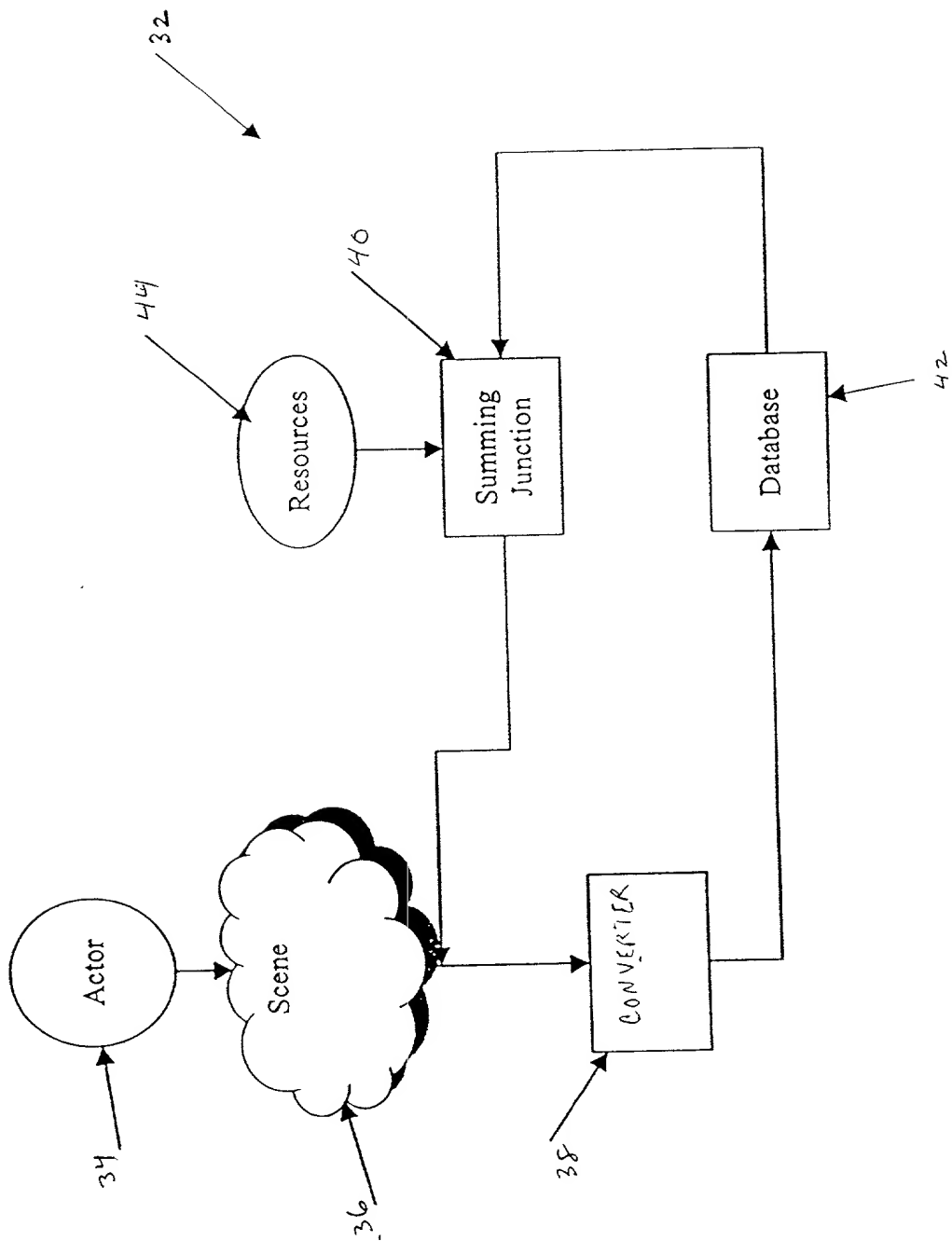


FIGURE 2

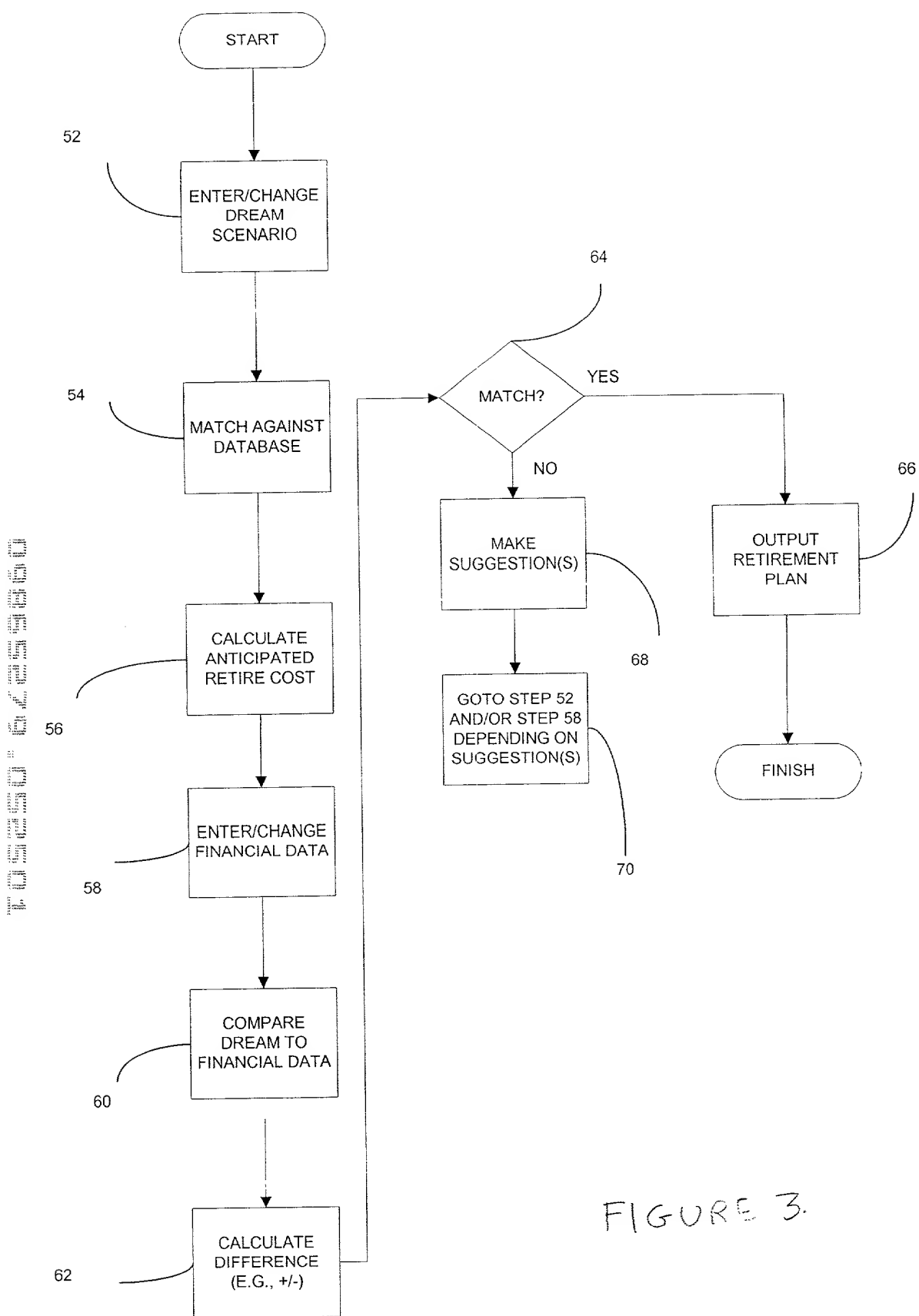


FIGURE 3.

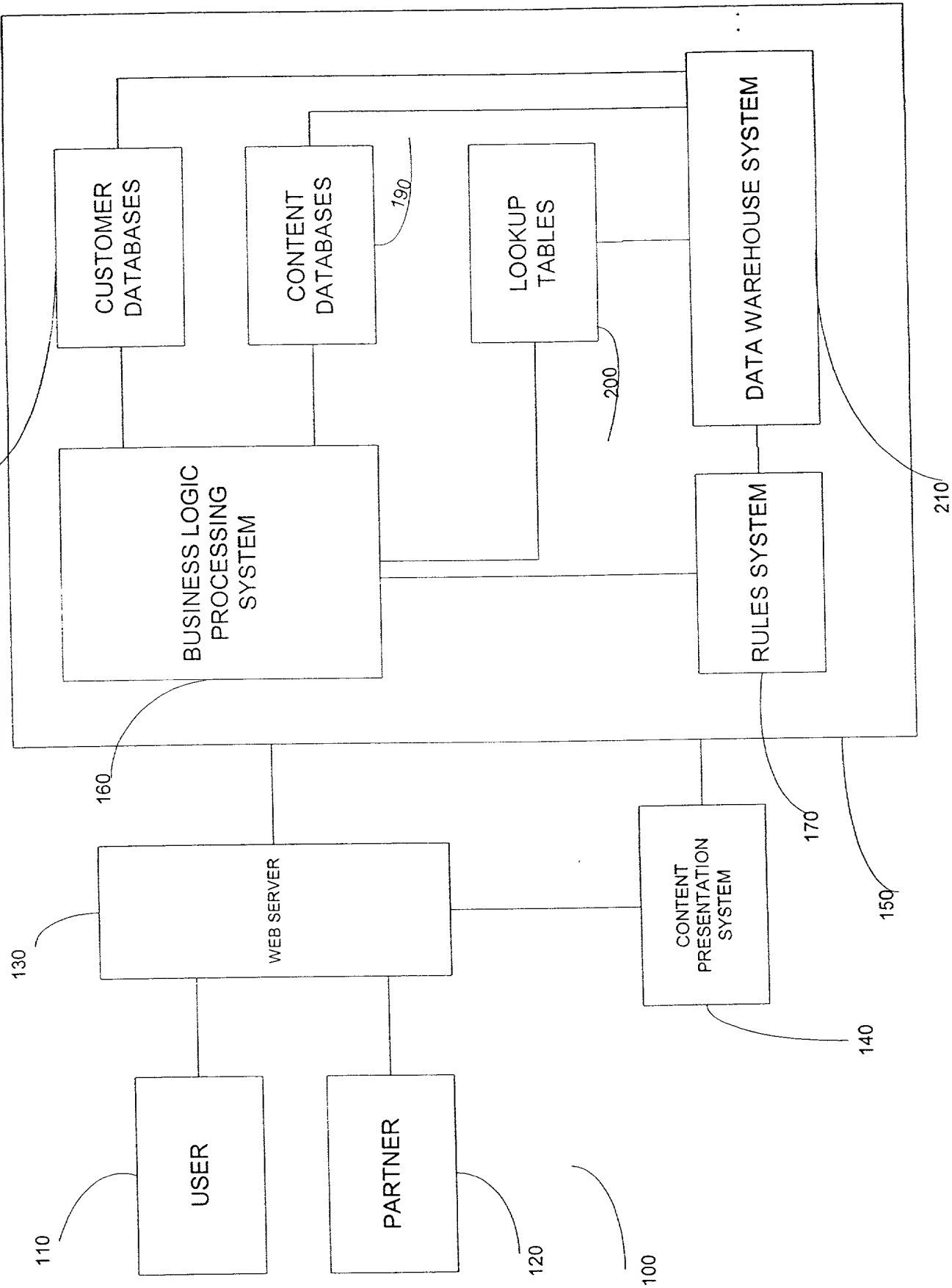


FIGURE 4

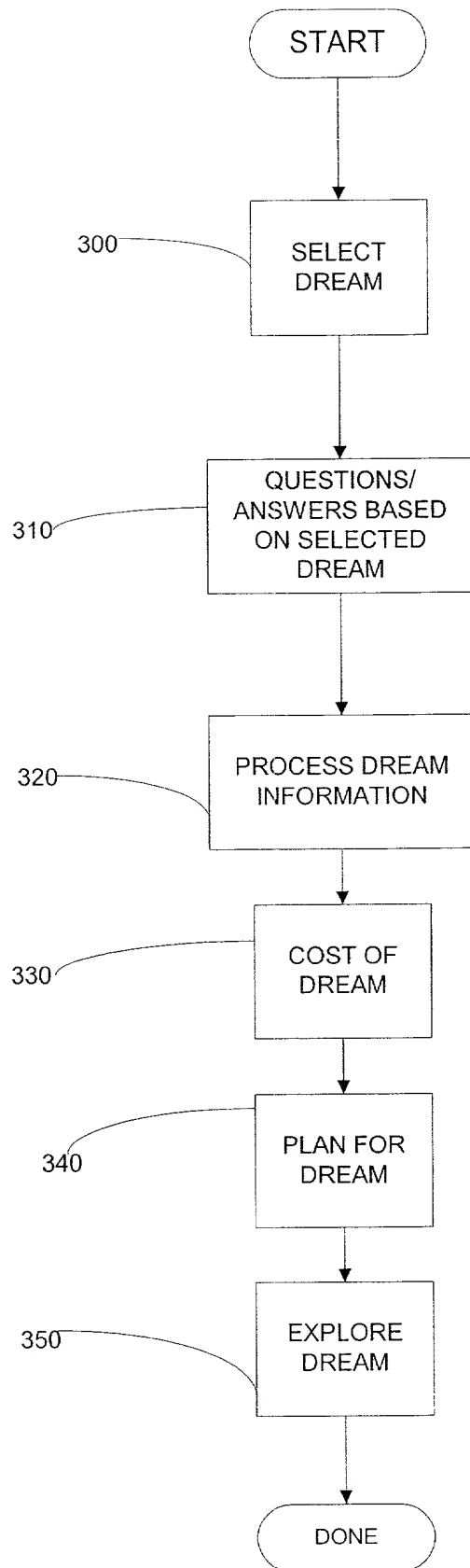


FIGURE 5

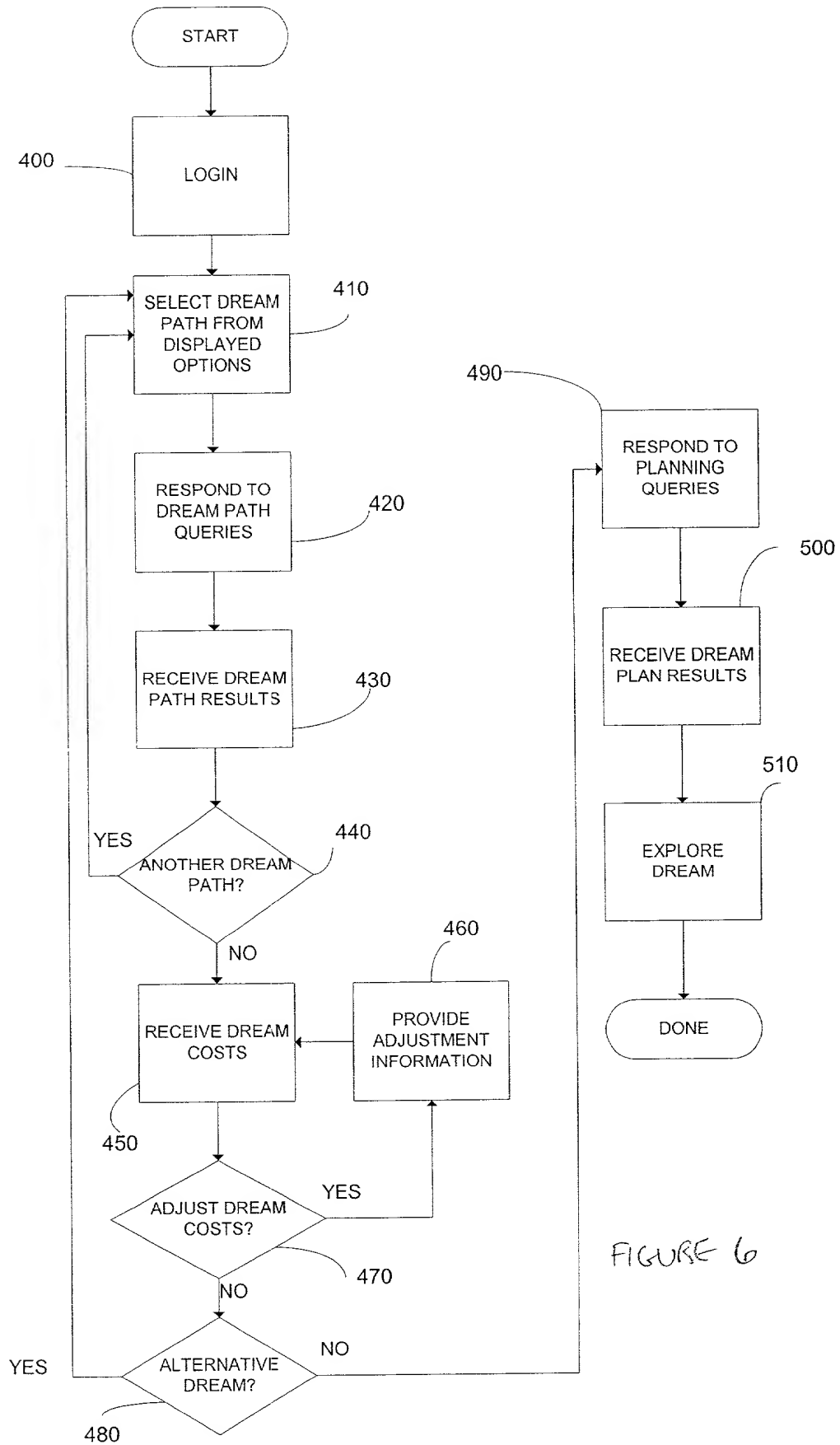


FIGURE 6

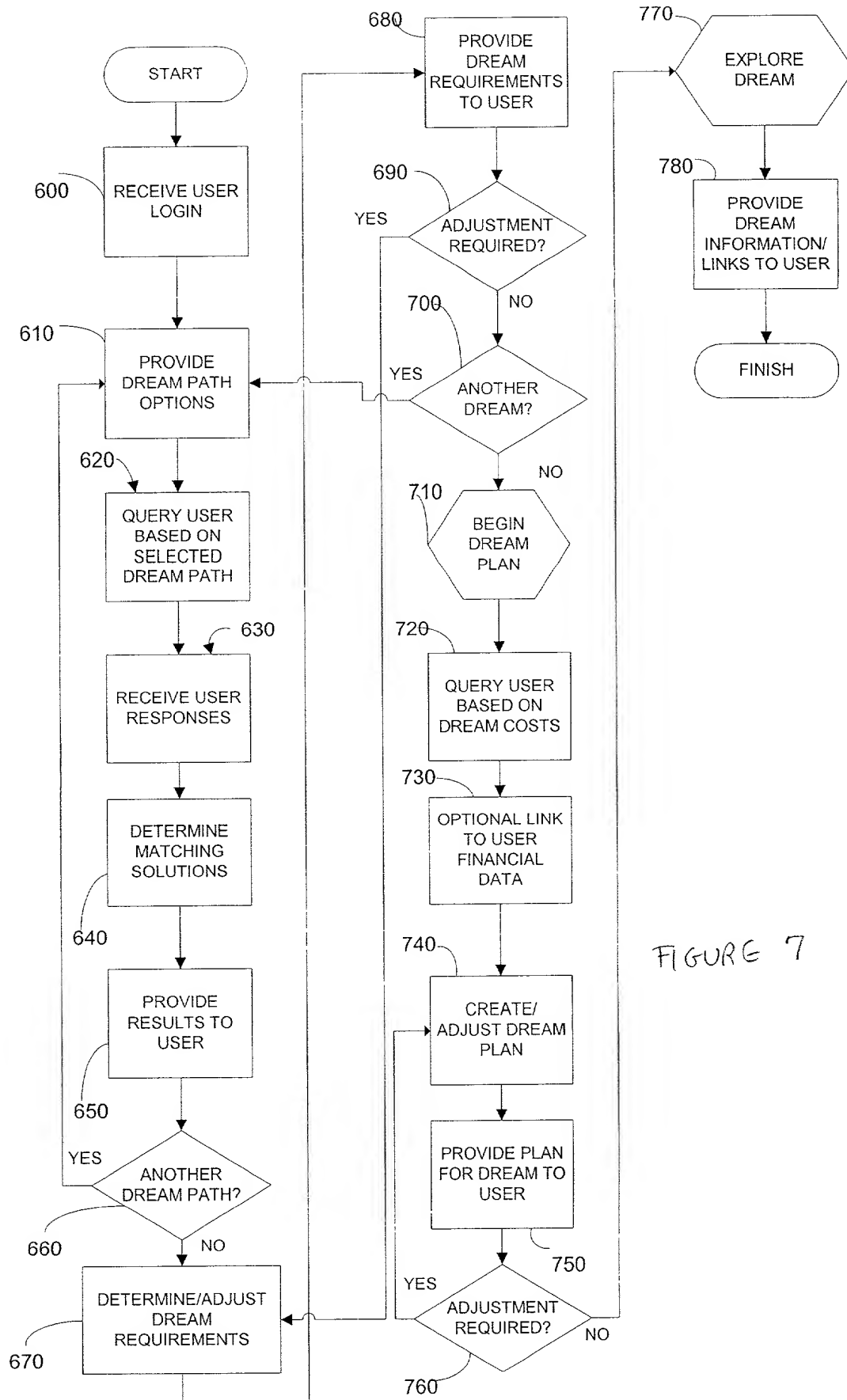


FIGURE 7

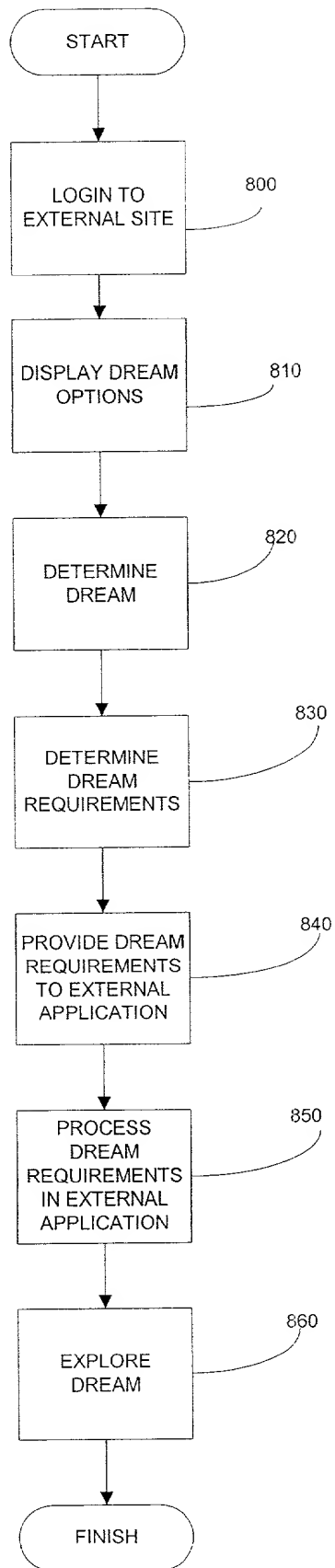


FIGURE 8

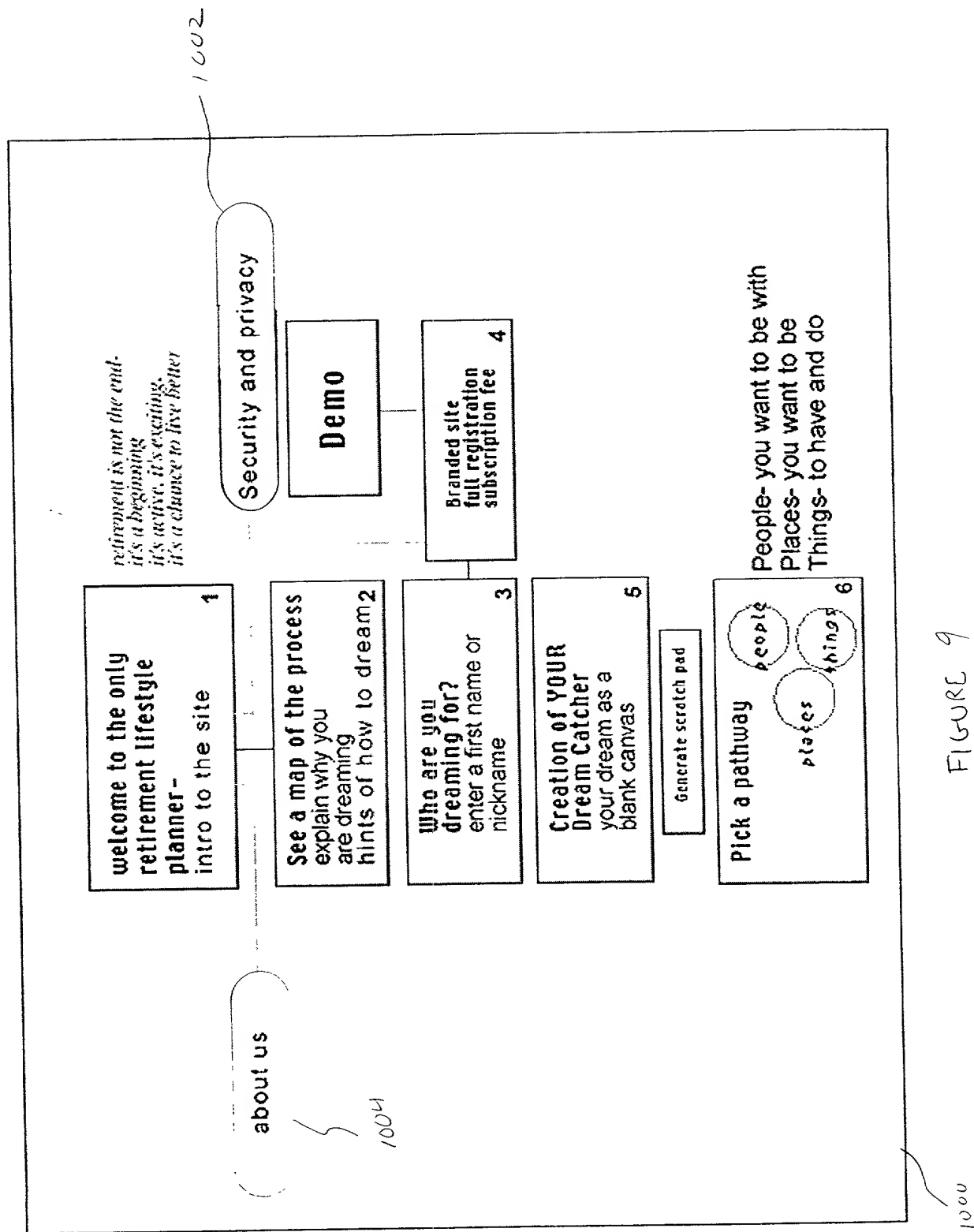
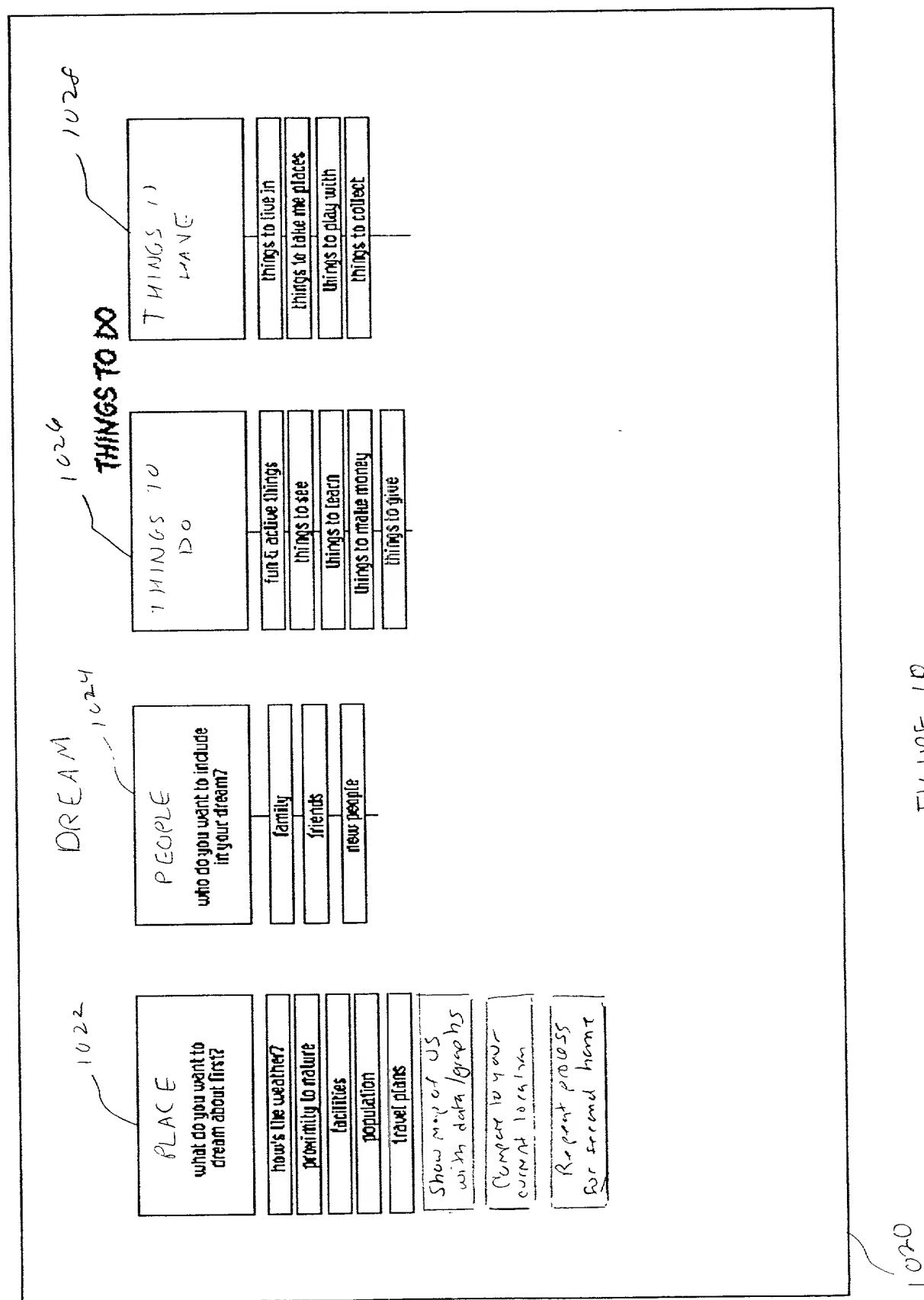


FIGURE 9



PLACE

what do you want to dream about first?

primary residence secondary residence U.S. travel destination

how's the weather?

in mid-winter

temperature should be
 any cold mild hot
 30 or lower 80 or higher

amount of rain
 if they pick cold then this says "snow"

any light mild heavy

humidity
 any low mild high

sunshine
 any cloudy mixed always sunny

wind
 any calm mild windy

in mid-summer

temperature should be
 any cold mild hot
 30 or lower 80 or higher

amount of rain
 if they pick cold then this says "snow"

any light mild heavy

humidity
 any low mild high

sunshine
 any cloudy mixed always sunny

wind
 any calm mild windy

go through remaining columns

FIGURE 11

what is key in finding a location for your second home:

proximity to nature
lakes, streams, mountains, etc.

facilities
hospitals, golf courses, transportation, etc.

population
urban, rural, affluence, etc.

no thanks-I know
where I want to be-show
me a map

how close to mother nature?

mountains

salt water

fresh water

wilderness & forests

parks & public spaces

deserts & plains

lakes & ponds

streams & rivers

go through
remaining columns

how close do you want to be?

to your health?

hospitals and doctors

care facilities

to your soul?

places of worship

places of worship

to go out or for the night?

hotels & restaurants

to go out or town?

bus, train, boats & airports

to be active?

sports, clubs, golf

to be entertained?

museums & theaters

or to go out of your mind?

colleges and universities

people who need people...

bright lights, big city

population of 500,000 or above

small towns

suburbia

how do you rate...

age of the population

affluence

gender mix

go through
remaining columns

hospitals & doctors...

hospitals

psychiatrists

dentists

general physicians

chiropractors

podiatrists

health practitioners

intermediate care facilities

chronic disease hospitals

care facilities

adult day care

senior citizens centers

home health care

religious churches

assembly of god churches

episcopal churches

methodist churches

lutheran churches

united methodist churches

etc....

bus stations

airports

marinas

amusement parks

public golf courses

bowling centers

golf courses

beating and swimming clubs

etc....

museums

art galleries

FIGURE 12

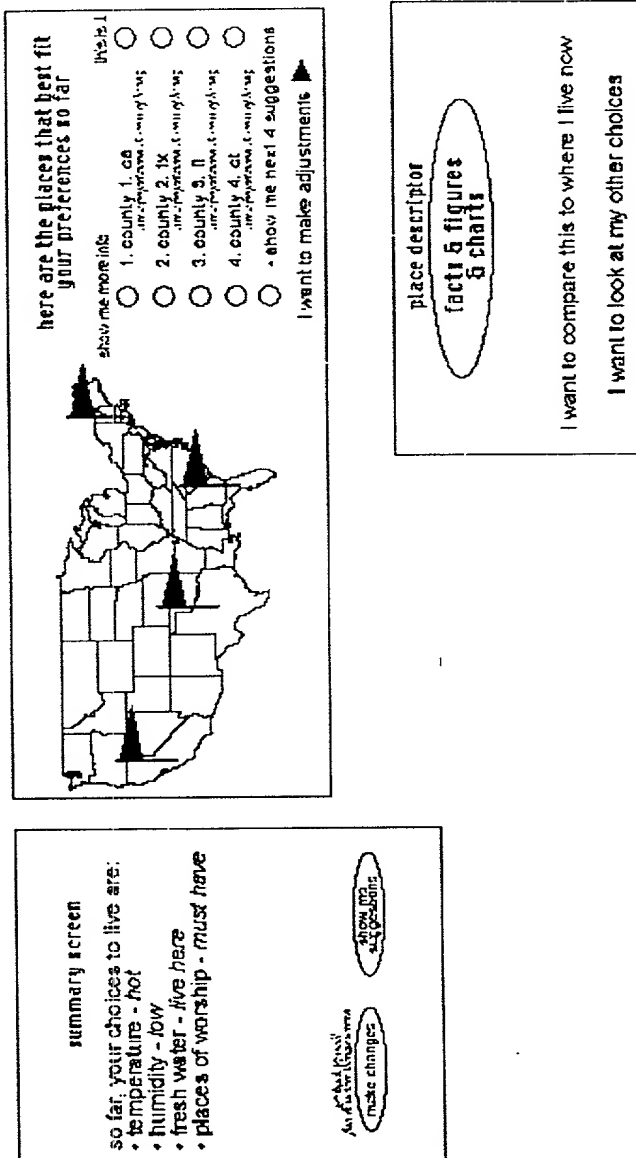
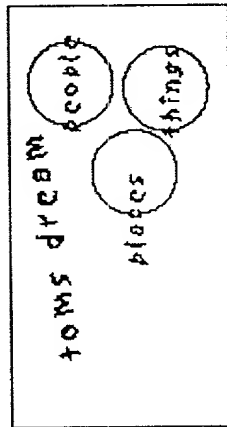


FIGURE 13



how important is it for you to include in your dream

family	current friends	new people
_____ + _____	_____ + _____	_____ + _____
doesn't matter important	doesn't matter important	doesn't matter important

FIGURE 14

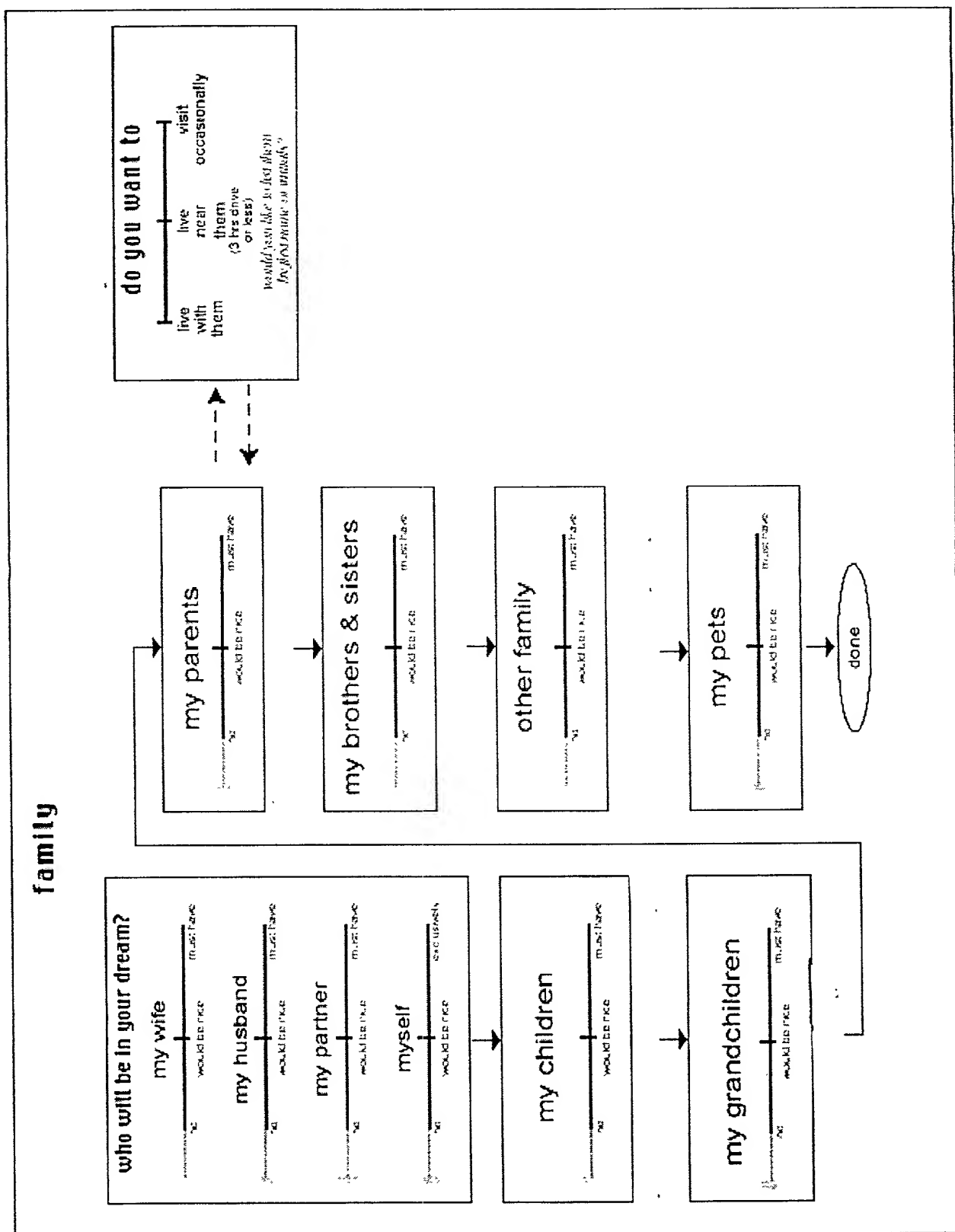


FIGURE 19

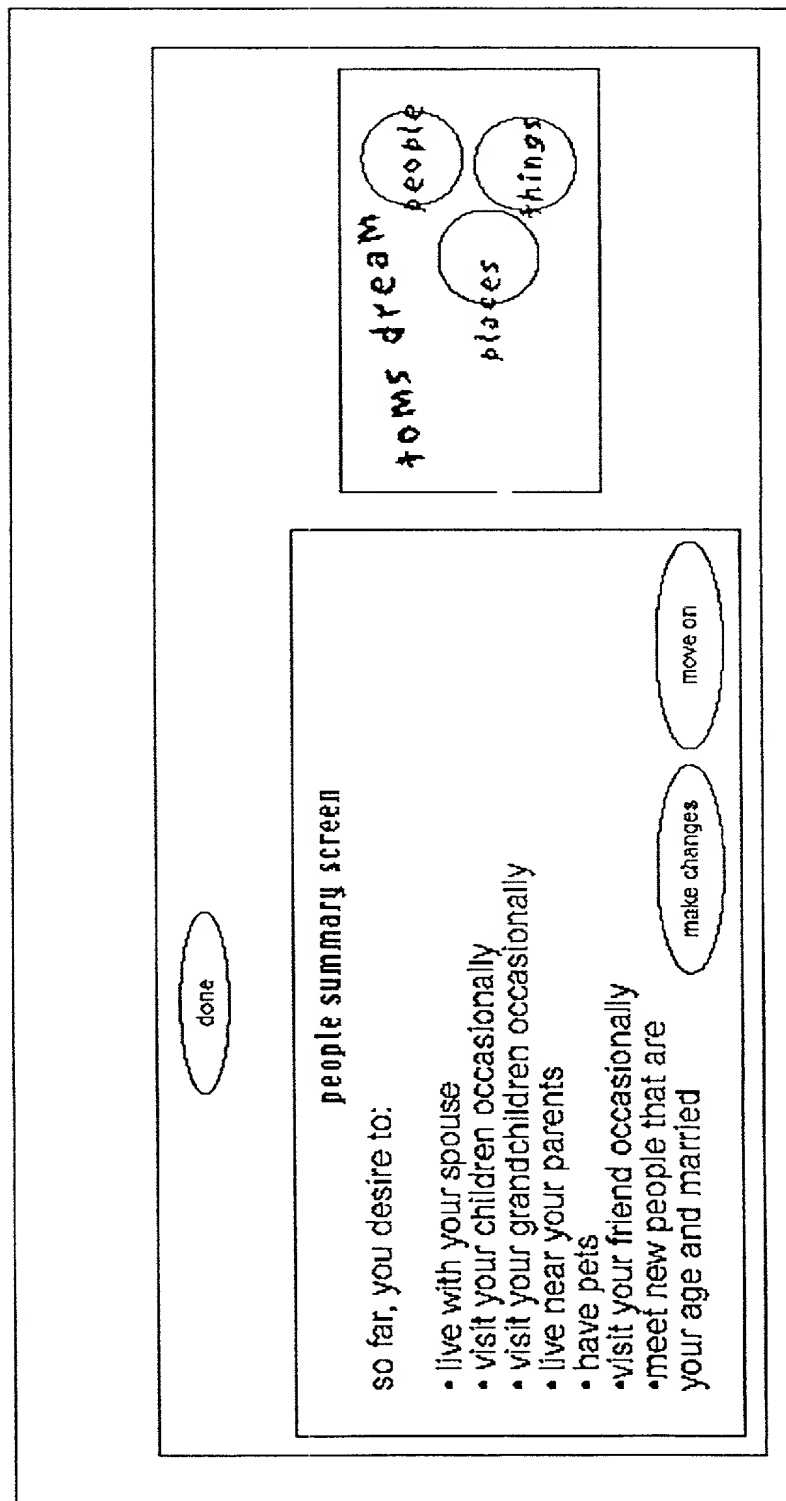


FIGURE 17

THINGS- to do

what types of activities are important to you?

things to see

museums plays sports, etc.

doesn't matter

important

things to learn

education, classes, new skills, etc.

doesn't matter

important

things to give

your time, your experiences, your assets, etc.

doesn't matter

important

fun & active things

go hiking, gardening, chess, walking, etc.

doesn't matter

important

things to make money

jobs, owning a business, etc.

doesn't matter

important

FIGURE 18

active things	things to see	things to learn
<p>let us help you pick an activity</p> <p>I want to do them...</p> <p>don't care inside both outside</p> <hr/> <p>don't care with a lot of people both alone</p> <hr/> <p>don't care on land both on water</p> <hr/> <p>don't care warm weather both cold weather</p> <hr/> <p>don't care with my mind both with my body</p> <hr/> <p>I know what I want. show me a list of activities</p>	<p>what would you like to see</p> <p>cultural events <i>musical plays, museums, etc.</i></p> <p>don't care must see</p> <hr/> <p>sporting events <i>football, basketball, hockey, etc.</i></p> <p>don't care must see</p> <hr/> <p>nature <i>amusement parks, forests, desert, or other natural parks, etc.</i></p> <p>don't care must see</p> <hr/> <p>I know what I want. show me a list of things to see</p>	<p>would you like to learn...</p> <p>NA for professional purposes both personal benefit</p> <hr/> <p>NA for fun both for official credit</p> <hr/> <p>NA from friends & neighbors both at a community education classes accredited institution</p> <hr/> <p>things to make money</p> <p>how would you like to make money</p> <p>no way job part time full time</p> <hr/> <p>no way my own business maybe definitely</p> <hr/> <p>no way my investments maybe definitely</p> <hr/>

FIGURE 19

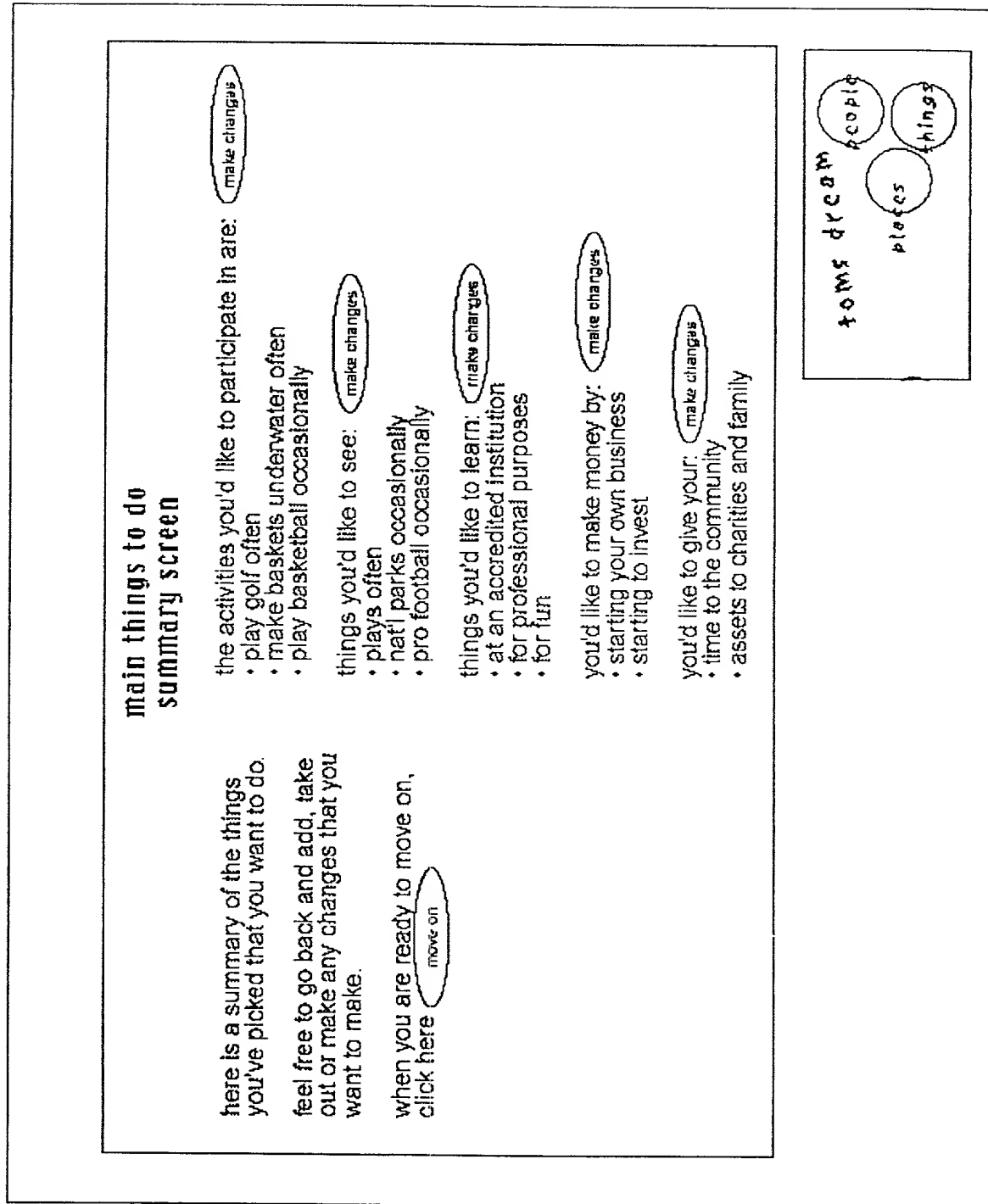


FIGURE 20

THINGS TO HAVE

what new things do you want to have?

things to take me places

car boat motorcycle plane, etc. electronics gadgets sports equipment, pets etc. doesn't matter would be nice must have

things to collect

stamps, antiques, art, etc. doesn't matter would be nice must have

THINGS TO LIVE IN

what sort of residence do you want?

stationary both mobile
small both large
on land both on water

i know what i want. show me a list of options

go to search/submit index of options

THINGS TO TAKE ME PLACES

do you want to travel:

by water by land by air

i know what i want. show me a list of options

go to search/submit index of options

THINGS TO PLAY WITH

do you want your playthings to be:

no alive yes
not really fun definitely
not really functional definitely
not really hightech definitely

i know what i want. show me a list of options

go to search/submit index of options

THINGS TO COLLECT

do you want your collectibles to be:

no alive yes
not really fun definitely
not really an investment definitely
not really of sentimental value definitely
old old or new? new

i know what i want. show me a list of options

go to search/submit index of options

FIGURE 21

[illegible]

FIGURE 22

Tom's dream what does your dream cost?

When you want to start your new life? in how many years?

Place People Things When Summary

Tom's dream

Your Place					
Golden, Colorado	\$1200 per month	<input type="text" value="adjust"/>	<input type="text" value="omit"/>	<input type="text" value="explore your cost"/>	
two bedroom- acre of land- 6 months a year					
Malibu, California	\$2000 per month	<input type="text" value="adjust"/>	<input type="text" value="omit"/>	<input type="text" value="explore your cost"/>	
condo near the ocean- 6 months a year					
Your people					
visits to grandchildren	\$700 per month	<input type="text" value="adjust"/>	<input type="text" value="omit"/>	<input type="text" value="explore your cost"/>	
Your things to do					
soc shows	\$80 per week	<input type="text" value="adjust"/>	<input type="text" value="omit"/>	<input type="text" value="explore your cost"/>	
Your things to have					
boat	\$400 per month	<input type="text" value="adjust"/>	<input type="text" value="omit"/>	<input type="text" value="explore your cost"/>	

17 years from now- In the year 2017 you will be able to realize your dream for a ballpark budget of note the up- this figure

how are you feeling right now?

When Place People Things Summary

FIGURE 2.3

Financial Plan Lite Calculator

Tom's dream

1) what is your total household income?	<input type="text"/>
2) how much of that do you expect to save each year?	
• in your retirement plans (401k, 403b, 457, IRA, etc)	<input type="text"/>
• other (stocks, bonds, mutual funds, CDs, etc)	<input type="text"/>
3) how much in savings do you currently have?	
• in your retirement plans (401k, 403b, 457, IRA, etc)	<input type="text"/>
• other (stocks, bonds, mutual funds, CDs, etc)	<input type="text"/>
4) what is the value of the house(s) & property you own?	
• approximate market value	<input type="text"/>
• approximate mortgage debt	<input type="text"/>
5) years to retirement	
• your current age	<input type="text"/>
• the age you want to retire at	<input type="text"/>
6) what annual investment rate of return do you want to assume?	
(chOOSE a rate of return before taxes)	
• for your retirement plan assets	<input type="text"/>
• for your other assets	<input type="text"/>

input summary options

FIGURE 24

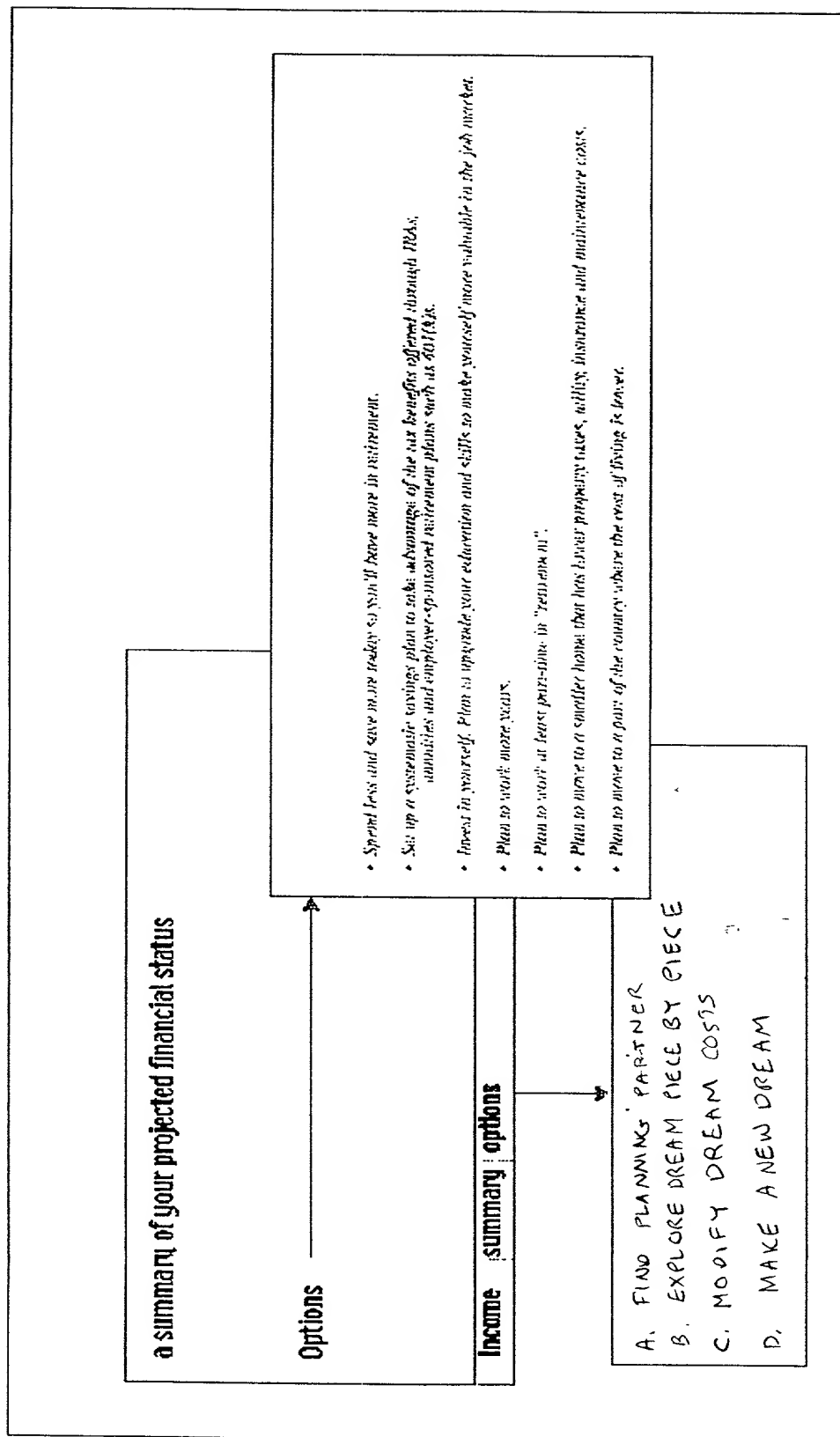


FIGURE 25

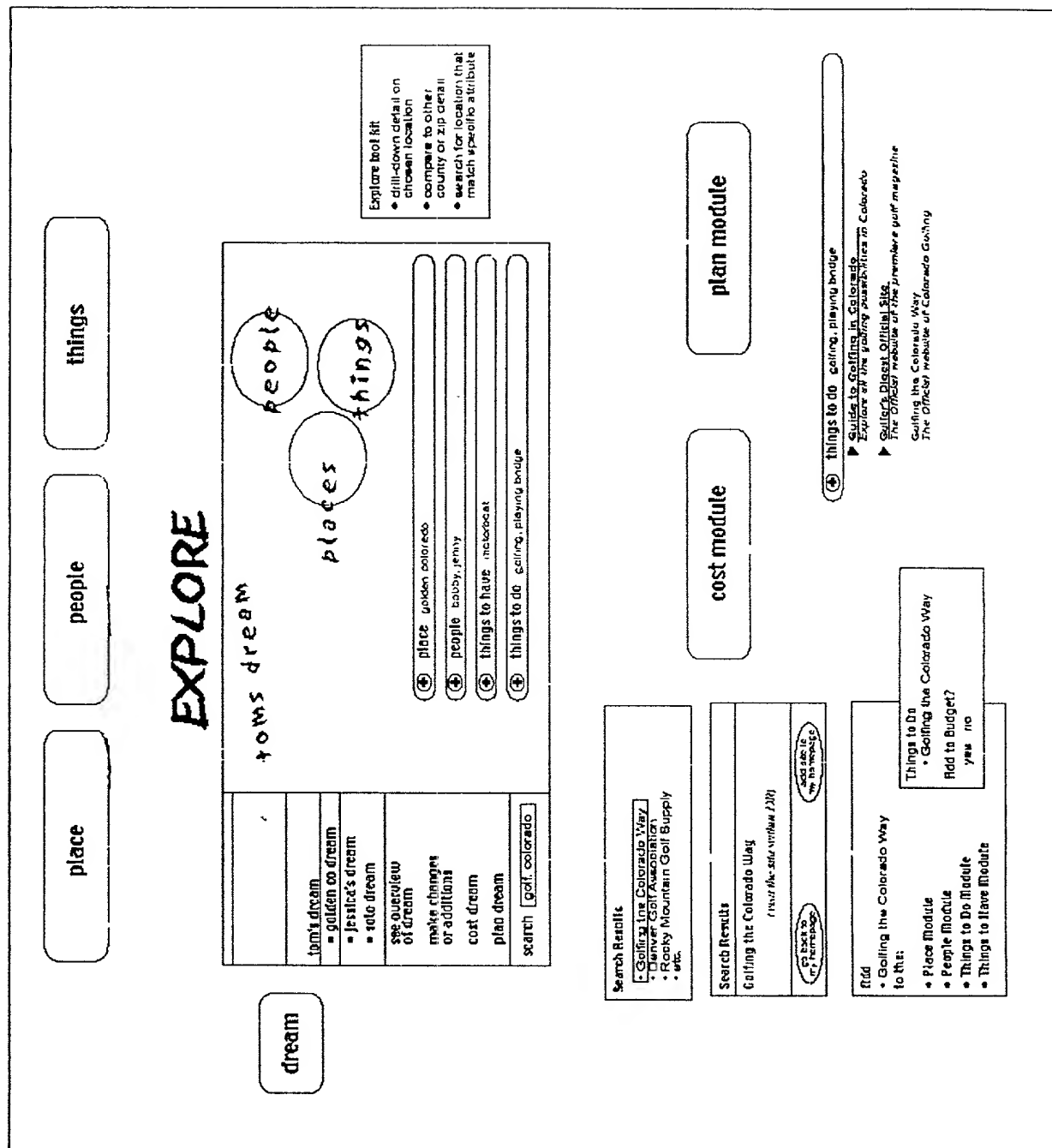


FIGURE 2 6

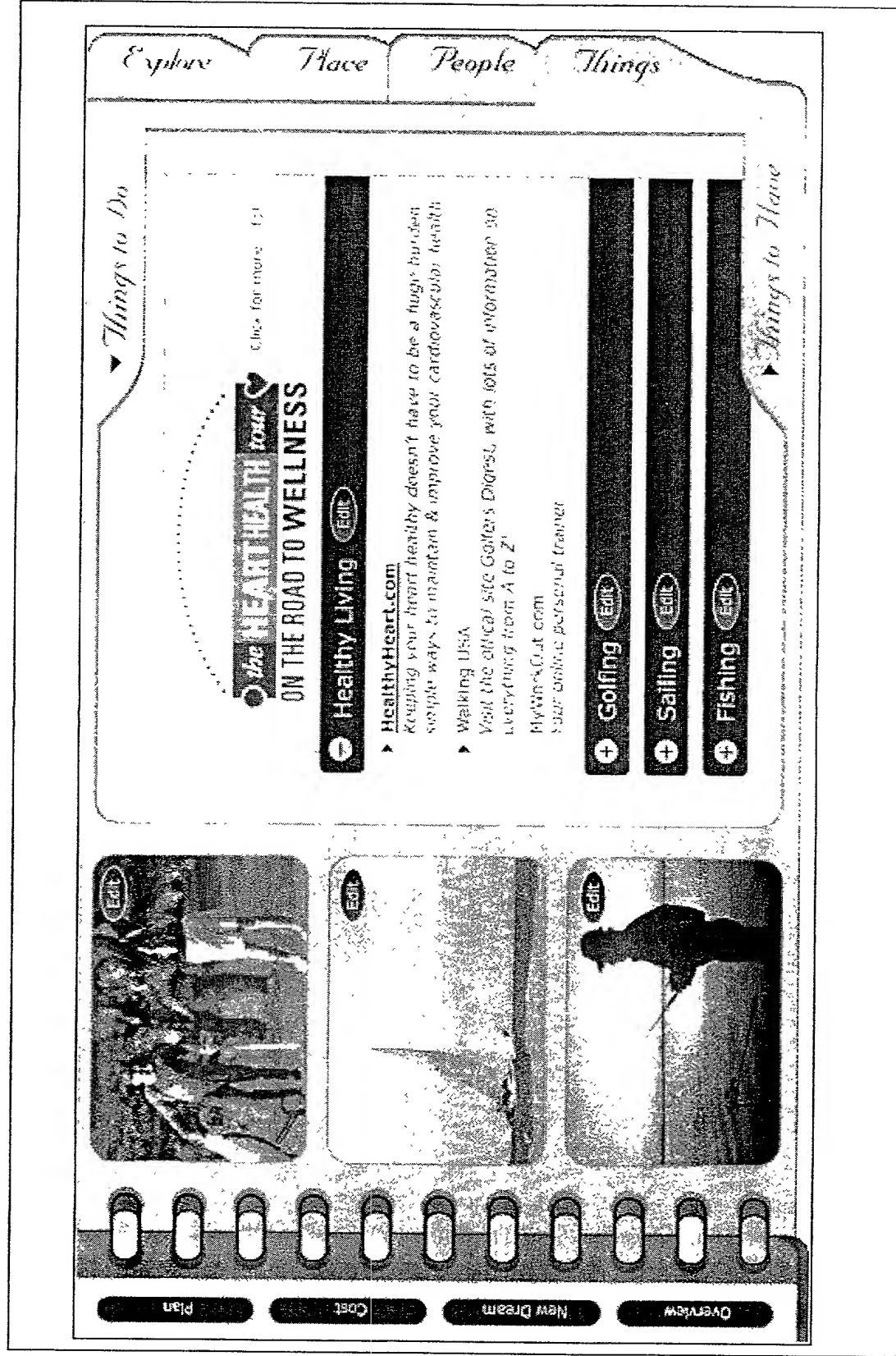


FIGURE 28

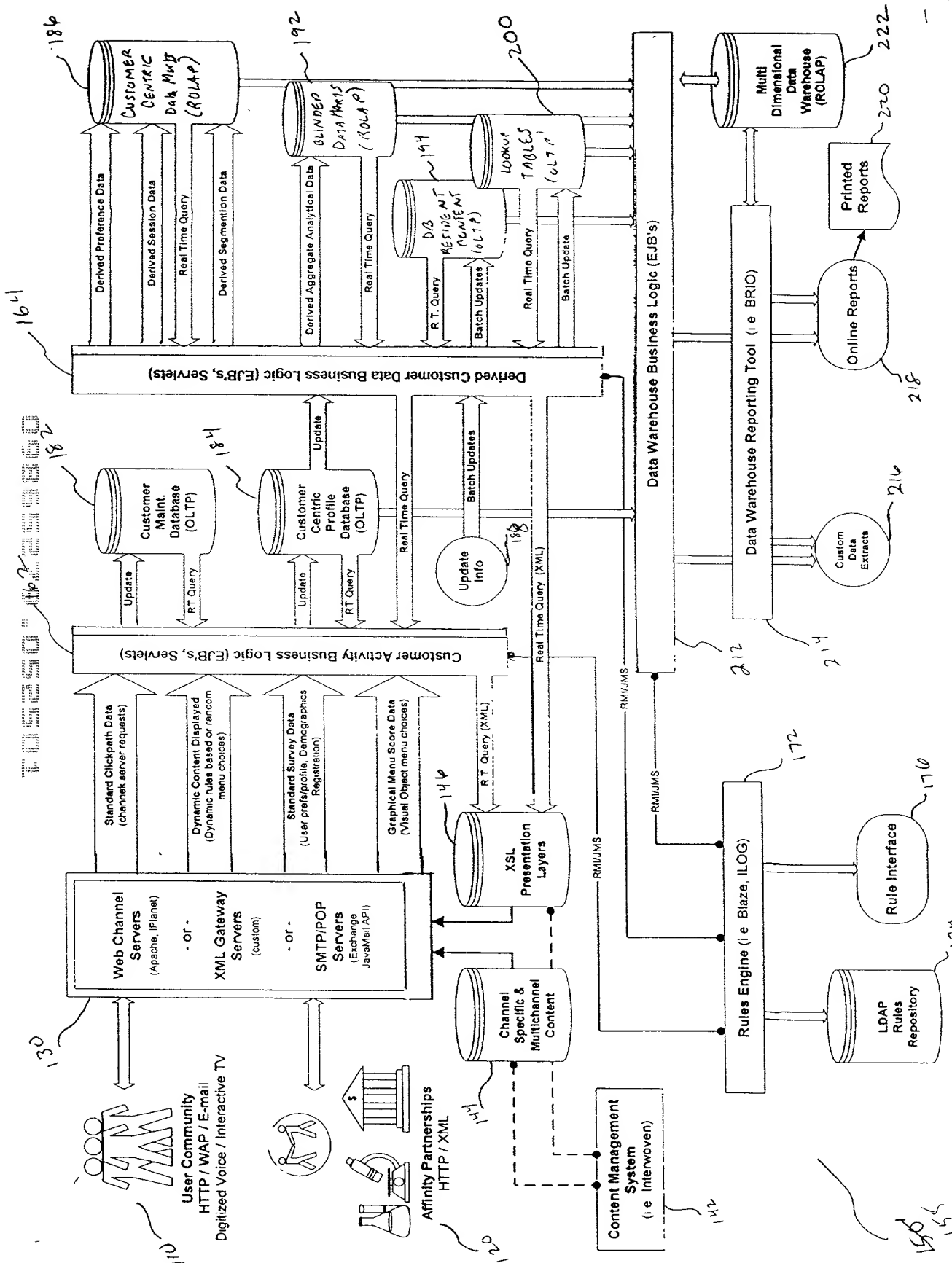


FIGURE 29